

Review Reminder extension for Magento2

User Guide

version 1.0



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1. Introduction

The document is a User Guide for extension **Review Reminder** created for Magento2 websites. It describes the extension functionality and provides some tips for a quick start.

Official page - <https://www.itoris.com/magento-2-review-reminder.html>

The purpose of the Review Reminder extension is to enhance the process of automatic review reminders sending and generate customer feedback on your website. The extension allows to send email notifications in bulk automatically or manually if customers purchase one or multiple products and orders get the "Complete" status. You are able to schedule the date when the review reminders are to be sent after the orders are invoiced and shipped.

You can track all sent and pending review reminders directly on the reminder log. Admin can apply various statuses to one or multiple reminders in bulk, remove, send manually or preview the email template. You are able send a test email to check how the email template will be shown in real emails. The default email template is fully customizable that could be easily configured for the store's needs.

The extension allows to choose a sender, send a BCC copy, clear logs in specified days. You are able to specify what customer groups will get email notifications or define conditions when the reminders should be sent.

2. Installation

2.1. System Requirements

The extension requires Magento 2.x

2.2. Installation

The extension is provided as a .zip archive with the source code and the installation instructions.

Unpack the source code into **/app/code/Itoris/Itoris_ReviewReminder/** folder on your server. And run the following commands in the SSH console:

```
php bin/magento module:enable --clear-static-content Itoris_ReviewReminder  
php bin/magento setup:upgrade
```

Then log into Magento backend and flush cache in **System -> Cache Management -> Flush Magento Cache**

If you experience any issues with the extension installation please contact us here -

<https://www.itoris.com/contact-us.html>

2.3. License

The extension has full open source code. One license/purchase can be used on a single production Magento2 website and its development instances. The extension can be customized for the license owner needs. Redistribution of the extension or its parts is not allowed. Please read more details here -

<https://www.itoris.com/magento-extensions-license.html>



3. How to Use

3.1. Settings

3.1.1 General Settings

You can find the general configuration following **STORES > Settings > Configuration > ITORIS EXTENSIONS > Review Reminder**.

Admin can manage the general and reminder settings per store view. Switch a necessary store view in the upper-left corner and configure the settings.

The cron job is to be configured to manage and make email notifications be sent automatically at 3 AM daily. Please refer to the Magento 2 documentation to configure the cron job for your site.

The screenshot shows the Magento 2 Configuration interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores (highlighted with a red box), System, and Find Partners & Extensions. The main content area is titled 'Configuration' and shows 'Store View: Default Config'. A 'Save Config' button is in the top right. The 'General' section is expanded, and 'Review Reminder' is selected and highlighted with a red box. The settings for 'Review Reminder' are as follows:

- Extension Enabled** (store view): Yes
- Send Reminder in X Days** (global): 14. Note: Reminders are sent daily for orders with status Complete.
- Reminder Template Sender** (store view): General Contact
- Reminder Email Template** (store view): Review Reminder (Default)
- Send a BCC copy of Reminder to** (store view): [Empty field]. Note: Enter email or leave blank if not necessary.
- Clean log records older than X Days** (global): 60. Note: If 0 is set the log will not be cleared automatically.
- Test Reminder** (global): [Empty field]. Note: Enter email to send a test reminder to. A 'Send a test email' button is next to it.

At the bottom of the configuration area, there is a section for 'Reminder Configuration'.

Extension Enabled – enables or disables the extension functionality.

Send Reminder in X Days – if orders get the "Complete" status review reminders will be sent automatically in specified days.

Reminder Template Sender – sends email notifications from the specified senders such as General Contact, Sales Representative, Customer Support, Custom Email 1, Custom Email 2.



Reminder Email Template – defines an email template to be sent. The "Review Reminder" template is chosen by default.

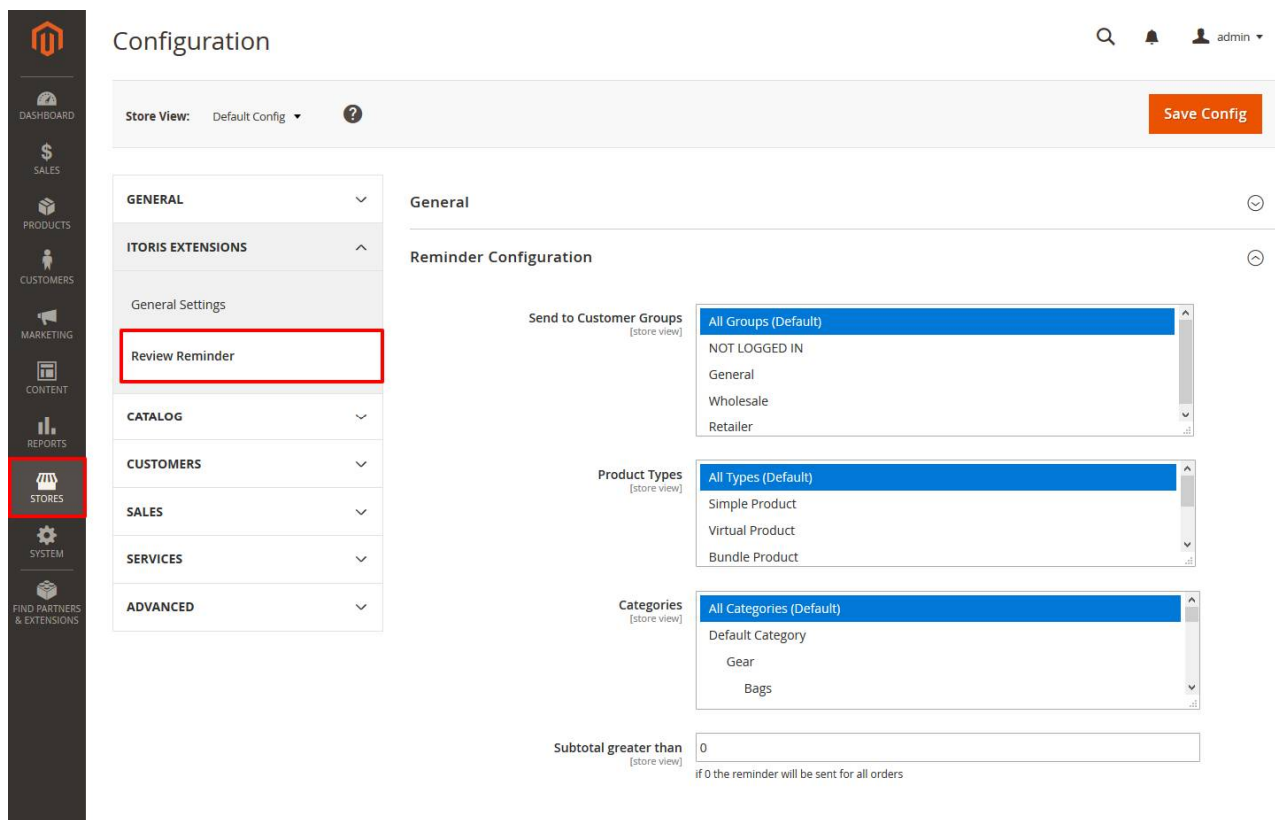
Send a BCC copy of Reminder to – sends BCC copies of reminders to the entered email address.

Clean log records older than X Days – removes old records after specified days of reminder's scheduled date. If "0" is set the log records won't be deleted.

Test Reminder – specifies an email address the test reminder will be sent to. Button "Send a test email" sends the chosen email template to the entered email address.

3.1.2 Reminder Configuration

You are able to define what customer groups will get email notifications or hide products, categories or the whole orders with the specified subtotals in review reminders.



Send to Customer Groups – defines customer groups the review reminder will be sent to.

Product Types – defines what product types can be included into email notifications.

Categories – defines what categories can be included into email notifications.



Subtotal greater than – defines the condition when the review reminder is to be sent, if the order subtotal exceeds the entered data. If "0" is set the reminders will be sent out for all orders.

3.2. Review Reminder Log

All review reminders are stored in the reminder log following **MARKETING > User Content > Review Reminder Log**. After orders get the "Complete" status all review reminders can be tracked in the reminder log.

ID	Date	Status	Order	Email	Customer Name	Action
2	2018-01-05	Pending	00000009	flwronline@mail.com	Barbara Cook	Select
3	2018-01-05	Pending	00000010	kitstyle14@gmail.com	J Gray	Select
4	2018-01-05	Disabled	00000011	carter1978@mail.com	Carter Carter	Select
5	2018-01-05	Disabled	00000012	olpstore@mail.com	Williams OLP	Select
7	2018-01-05	Pending	00000014	clsrbt@gmail.com	Robert Butler	Select
8	2018-01-05	Pending	00000015	contactme@mail.com	IU Dioli	Select
1	2017-12-22	Sent	00000008	richhughes@mail.com	Richard Hughes	Preview
6	2017-12-22	Sent	00000013	davidallenym@gmail.com	David Allen	Preview
9	2017-12-22	Sent	00000016	lindqvist@mail.com	JK Lindqvist	Preview
10	2017-12-22	Sent	00000017	liammiller619@gmail.com	Liam Miller	Preview

You are able to remove or change the columns' positions on the grid. The filter tool allows to find a necessary value by entering criteria.

The mass actions tool provides the following options:

Disable – makes the chosen review reminder unable to send. Admin can disable reminders directly on the grid or clear the log in specified days. Please refer to Chapter **3.1.1 General Settings**.

Enable – activates the disabled review reminders.

Send Now – allows to send email notifications manually.

The following columns are available:

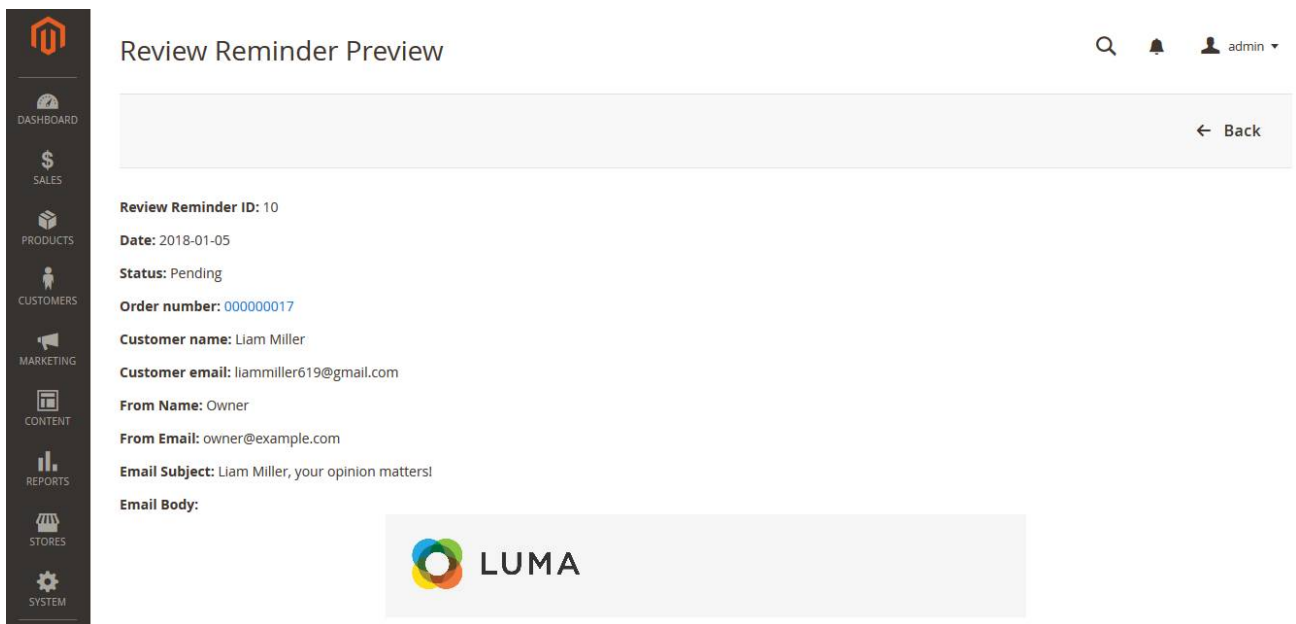
- **Select** – allows to select multiple records to apply the actions to.
- **ID** – defines the reminder's ID.



- **Date** – displays when the notification is to be sent if the reminder has the "Pending" status.
- **Status** – display the following statuses:
 - Pending** – the email notification will be sent according to the set conditions.
 - Disabled** – the email notification is not available for sending.
- **Order** – opens the chosen order for editing.
- **Email** – displays the email the notification should be sent to.
- **Customer Name** – displays the customer's name.
- **Action** – provides the following actions per reminder:
 - Disable** – disables the review reminder.
 - Send Now** – allows to send the review reminder manually.
 - Preview** – allows to preview the email templates to be sent to the customer.

3.2.1 Review Reminder Preview


Admin can preview the chosen reminders on a separate page by clicking the "Preview" option. The page will have the following detailed information available for admin only:



Review Reminder Preview

← Back

Review Reminder ID: 10
Date: 2018-01-05
Status: Pending
Order number: 00000017
Customer name: Liam Miller
Customer email: liammiller619@gmail.com
From Name: Owner
From Email: owner@example.com
Email Subject: Liam Miller, your opinion matters!
Email Body:

 LUMA

Review Reminder ID – displays the reminder's ID.

Date – displays the date when the reminder should be sent or the date when the reminder is sent.

Status – displays the current reminder's status: **sent**, **pending** or **disabled**.

Order number – opens the order's details.

Customer name – displays the full customer's name.

Customer email – displays the customer's email the notification will be sent to.



From Name – displays the sender the review reminder will be sent from.

From Email – displays the sender's email the review reminder will be sent from.

The email body shows the products in the customer's order and provides links to each product in the list. Thus customers can leave reviews in a few clicks.

If users want to unsubscribe from getting review reminders, the "Unsubscribe" link is available in each email. Customers are redirected to the separate page in the store notifying about unsubscribing.

Review Reminder Preview ← Back

Email Subject: Liam Miller, your opinion matters!

Email Body:

Dear Liam Miller,

Thank you so much for your recent order with Main Website Store!

Will you please take a minute to share your experience? Other Main Website Store customers would LOVE to know what your thought of the items below! Click the "Write a Review" button under the products from your recent order.

Endurance Watch

[Write a Review](#)

Crown Summit Backpack

[Write a Review](#)

Typhon Performance Fleece-lined Jacket

[Write a Review](#)

If you no longer want to receive this email please [unsubscribe](#).

Thank you,
Main Website Store Customer Care

[About Us](#)
[Customer Service](#)



3.3. Review Reminder in Email

This is how your customers will see the review reminder in the mail:

